Vermont Department of Housing and Community Affairs

Applicant/Grantee Users Manual

Version 1.0

Development Grants Management System

Revised: 9-17-2007

Table of Contents

1. System Requirements

The Development Grants Management System was designed so that the vast majority of computer users will be able to use the system with little or no change to their computer environment. The four requirements that are mentioned below are common computer elements that should be already present on most machines.

The Development GMS requirements listed below can also be viewed on the system itself by clicking the “review the system requirements” link from the system homepage.

1.a. Operating System

The Development GMS was designed for both of the two most common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing the system from a Macintosh environment are required to have MacOS 7.5 or higher running on a PowerPC processor. Windows users are required to have an operating system that is Windows 95 or higher.

1.b. World Wide Web Connection

The Development GMS is an Internet application. It is accessed via the Internet and was specifically designed for Internet usage. The Internet is the more general term that is typically used to refer to the World Wide Web. The World Wide Web consists of a vast array of content that is accessible via a web browser. For the purpose of accessing the Development GMS, the standard Internet connection is via a modem connection. A modem is a piece of hardware that connects to the computer to send data through a phone line to and from the computer. Internet connections that are "faster" than a modem connection, such as cable and DSL, will improve the speed at which the system operates, but are not necessary in order to use the system. If you are in an office environment, you may already have an Internet connection, but if you are unsure, please contact your organization's network administrator.

For those using a dial-up connection over a modem, it is highly recommended that you have a modem connection speed of at least 33.6 kbps (kilobits per second).

1.c. Web Browser

This system was designed to be compatible with common up-to-date web browsers including Internet Explorer, Firefox, Safari, and Opera.

1.d. Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat Reader you may choose to view, print, or save these documents. If you do not have an Adobe Acrobat Reader you can go to www.Adobe.com and download one for free.

2. The Development Grants Management System Homepage

To access the Development Grants Management System, type http://development.grants.vermont.gov into the address bar of your web browser and hit “Enter”.

The page you see should look like the image shown below.

2.a. Browser Configuration

In order to avoid various browser-related restrictions unnecessarily placed on the Development GMS, please make the following configuration changes for the web-browser that you are using.

2.b. Internet Explorer

If you are using Internet Explorer, it is recommended that you add the Development GMS homepage to your list of trusted sites. To do this, please complete the following steps:

1) Click "Tools"
2) Click "Internet Options"
3) Click the "Security" tab
4) Click "Trusted Sites"
5) Click the "Sites" button
6) In the "Add this Web site to the zone:" textbox type "http://development.grants.vermont.gov/" and then click the "Add" button
7) Click the "OK" button, and then click the "OK" button again

3. Gaining Access to the Development GMS

In order to use the system you must first be granted access to it. There are two basic ways to get access to the Development GMS.

You may either

1. Request access to the system and get approved by a system administrator

   or

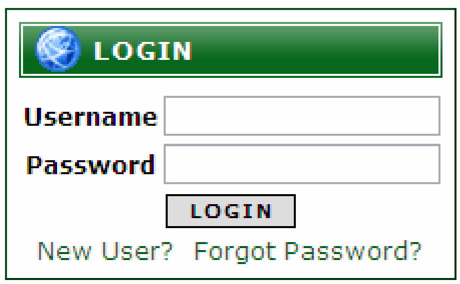
2. Be granted access by someone from within your own organization

Both of these two processes are described below.

Definitions of roles throughout this manual can be found in section 9 of this manual.

3.a. Gaining Access Through a System Administrator.

The first way to get access to the system is by being approved by a Agency/Department system administrator. This process is used if you are the first user from your organization or municipality that needs access to the system, and in this instance, the system administrator will be a representative from the Agency/Department you are applying to.



1) From the Development GMS homepage click the "New User?" link located in the "Login" section.
2) Complete the user form in its entirety.
   a) The 'Username' field must consist of all letters or numbers and must be between 5 and 12 characters long.
   b) The 'Password' field must consist of all letters or numbers and must be between 7 and 12 characters long.
   c) The fields 'Password' and 'Confirm Password' must be the same.
3) Click "Save" to save the data.

Having saved your contact information, your account must then be validated by an administrator before you can access the system. You, or some member of your organization, will then be contacted by phone by a state official to confirm that you should be granted access for the organization in which you applied for access.

If you attempt to access the system prior to getting validated by a system administrator you will receive the following message:

Your account has not been validated yet.

When access has been granted to you by a system administrator you will receive an email message confirming that your account has been validated. You may log into the system and begin to create other users accounts.

3.b. Gaining Access Through Another in Your Applicant Organization

The second way in which you can get access to the system is by having a user from your organization or municipality add you to the system. In order for this to occur, the user must be assigned the role as an Administrator or Municipal Official. In the same way, if you have been assigned one of these roles you may also add users to the system.

1) The Administrator or Municipal Official must first login to the system.
2) From the Main Menu the organization's administrative user must then click the name of the Organization in the My Organization section for which they would like the new user added. (The administrative person will see the Organization's name as well as a role of either Administrator or Municipal Official.)
3) At the bottom of the Organization screen is an "Organization Members" section. By default the "Current Members" tab will be active and below it will be listed the various members of the organization. If the person whose account must be added is not shown, the organization's administrative user should click the "Add Members" tab.

ORGANIZATION MEMBERS

1: Current Members | 2: Add Members

☐	Person	Role	Active Dates		Assigned By
☑	Administrator, Application	Application Administrator	1/1/2007	-	mo, Agate
☑	brown, larry	Writer	11/11/2006	-	McConnell, Todd
☑	Jetson, George	System Administrator (VTDHCA)	11/1/2006	-	Smith, Sally
☑	mo, Agate	Municipal Official	2/1/2007	-	Admin, System
☑	Moubray, Michelle	System Administrator (VTDHCA)	1/1/2007	-	Admin, System
☑	Officer, Financial	Financial Officer	2/1/2007	-	Admin, System
☑	Smith, Sally	System Administrator (VTDHCA)	11/1/2006	-	Admin, System
☑	Specialist, CD	CD Specialist	12/1/2006	-	Nedow, Megan
☑	Writer, Agate	Writer	8/1/2006	-	McConnell, Todd

4) After clicking the tab, the organization's administrative user should first search for the person that he or she wishes to add by typing in part of the user's name into the "Person Search" box and then by clicking the "Search" button.
   a) If the user exists he or she will be shown below the search box. The "Selected" checkbox should be checked and the user should be assigned a role within the organization and active dates. Finally, the "Save" button must be clicked in order to add the user. For definitions of possible roles refer to section 9 of this manual.

b) If no users were found that matched the search criteria the organization's administrative user should proceed to step five below.

5) Having found no match in the system the organization's administrative user should click the "Add New" button. Basic demographic information must be included for the user that requires an account. When the information has been entered, the "Save" button must be clicked.

4. Communication from the Development GMS

There are a variety of ways that you can receive information from the Development GMS.

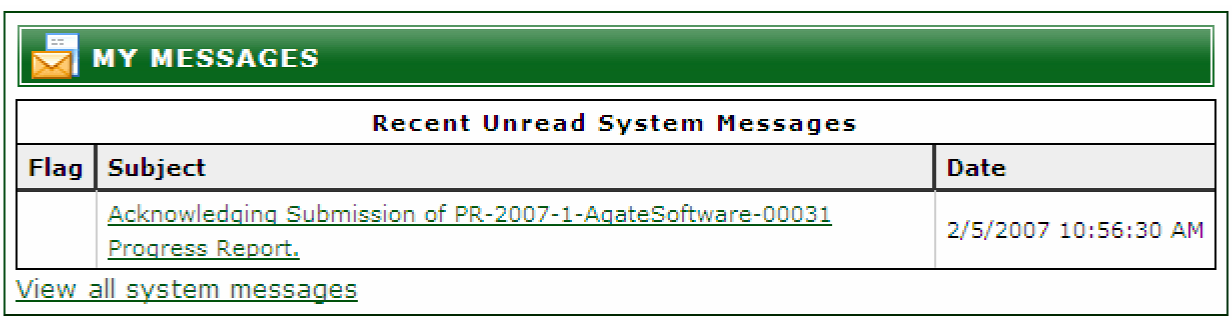
4.a. Automatic Email Notifications

Automatic email notifications may be sent to you periodically throughout the grant year. These messages will be sent via the system according to an automatic process or as the result of a user-triggered event. These messages might accompany the creation of an application, the submission of an application, or a pending due-date that is approaching. These messages are intended to help you know what is occurring in the system that pertains to you or your organization. These messages may also be sent by DHCA personnel.

In order to receive these messages, it is important that you include an active, frequently used email address when creating your contact record in the system. If you provide an incorrect email address or an address to an account that is either inactive or full, you will not be able to receive these important messages.

4.b. System Messages

In addition to the automatic email notification, there is an area referred to as the System Messages that manages messages sent to you either from the system itself or from DHCA personnel. You can view or edit your System Messages by following these steps:



Click the Subject of a message or click the "See All" link from the My Messages section on the Main Menu.

a) Clicking the Subject of a message will take you to the message itself. You can read the message from that screen and then may perform any of the following actions:
   (1) Click the "List" button to view a full list of your messages in your My Messages folder.
   (2) Click the "Delete" button to delete the message.
   (3) Choose a folder from the dropdown list and click the "Go"

b) Clicking the "See All" link will bring you to the My Messages folder where you may perform any of the following actions:

(1) Click the Subject of a message to read a message in the folder.
(2) Click the "Folder Administration" button to create a new folder in which to store system messages.
(3) Click a folder name to see all of the messages in that folder.

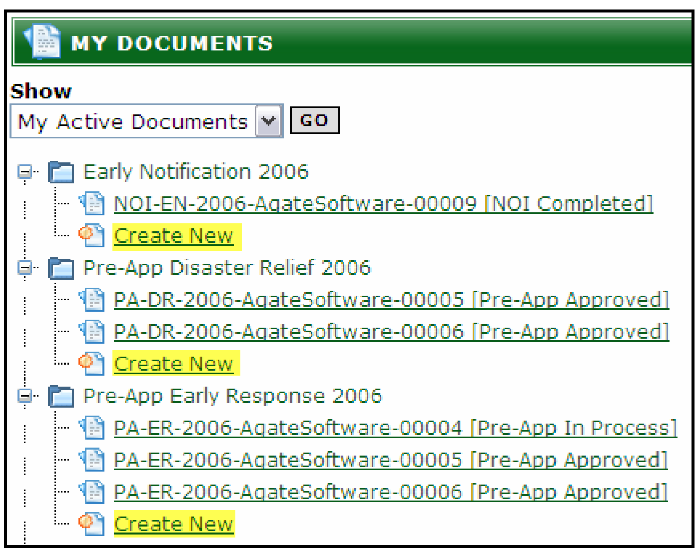
Automatic email notification and system messages will help you to know the events that are occurring in the Development GMS and will keep you up-to-date on the progress of your grant related items.

5. The Application and Pre-Application Process

5.a. Creating an Application or Pre-Application

Only those with a role of Municipal Official, Administrator or Administrator/Financial Officer will be able to create an application or pre-application in the Development GMS. In order to create an application or pre-application please follow these steps:

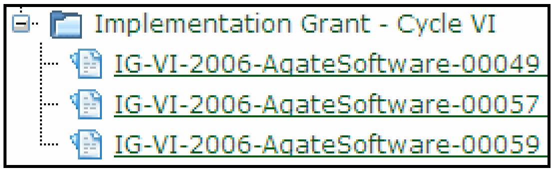
From the Main Menu, look at the My Documents section. This section will show you all of the grant programs where you either have existing grants, applications, or pre-apps in the system, or where you may apply for a new grant application or pre-application. For those grant programs where you can apply for a new grant application or pre-application you will see a "Create New" link beneath the name of the grant program. Click the "Create New" link.



1. You will be brought to a confirmation page asking you to confirm your selection. Click the "I Agree" button.
2. An application or pre-application will be created for you and you will be redirected to the Application Menu.

Following the creation of an application or pre-application a link to the record will appear on the Main Menu for all of those within the organization. The link to the application or pre-application will appear in the My Documents section under the name of the grant program. The link format is shown below.

Link Format: Grant Abbreviation – Fiscal Year – Organization abbreviation – Unique Identifier (IG-VI-2006-TestOrg-00049). See below for more examples.

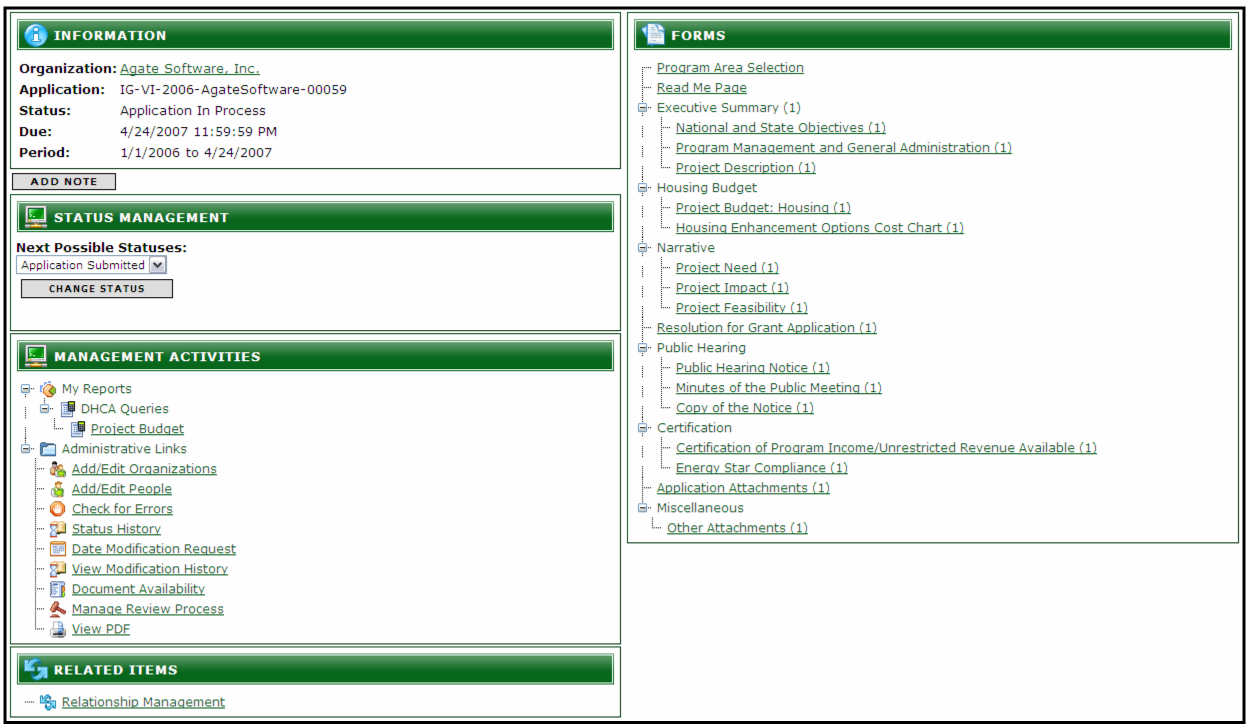


Click the link to return to the Application menu.

5.b. Add/Edit People

Please see the New User Registration Guide or the New User Activating Guide for CEOs on the login page of the Development Grants Management System.

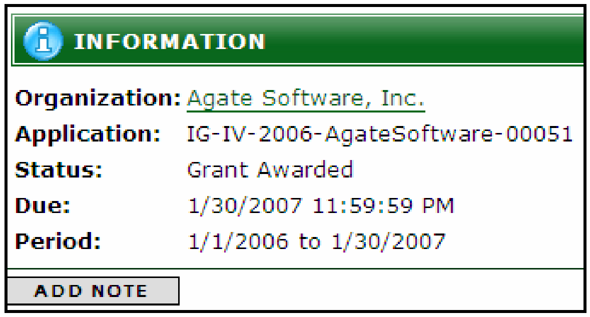
5.c. Application Menu Sections



The Application Menu is organized into various sections that help to organize the application/pre-application tasks and information. These sections are described below.

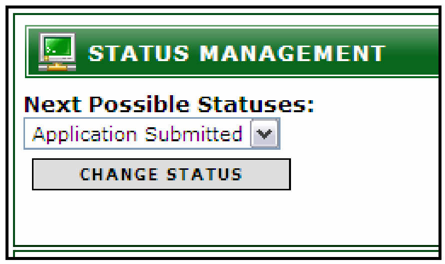
5.d. Information Section

The Information section contains important information about the application/pre-application such as the organization that initiated the application/pre-application, the application/pre-application identifier, and the status.



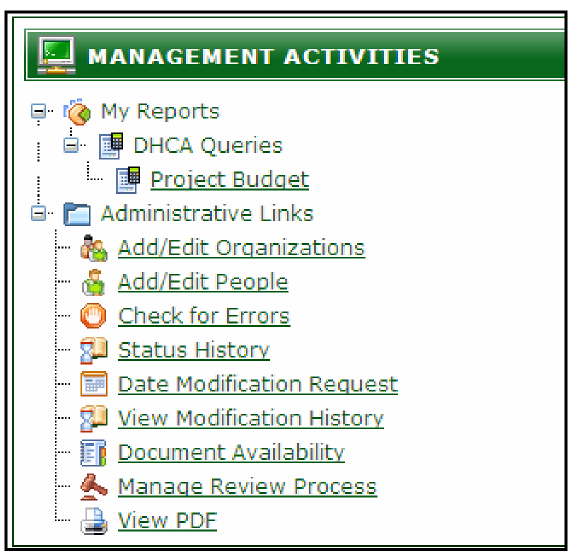
5.e. Status Management Section

The Status Management section allows an applicant user the ability to push the application/pre-application to the next status level. Only users with the ability to move the application to the next status will see the status management section.



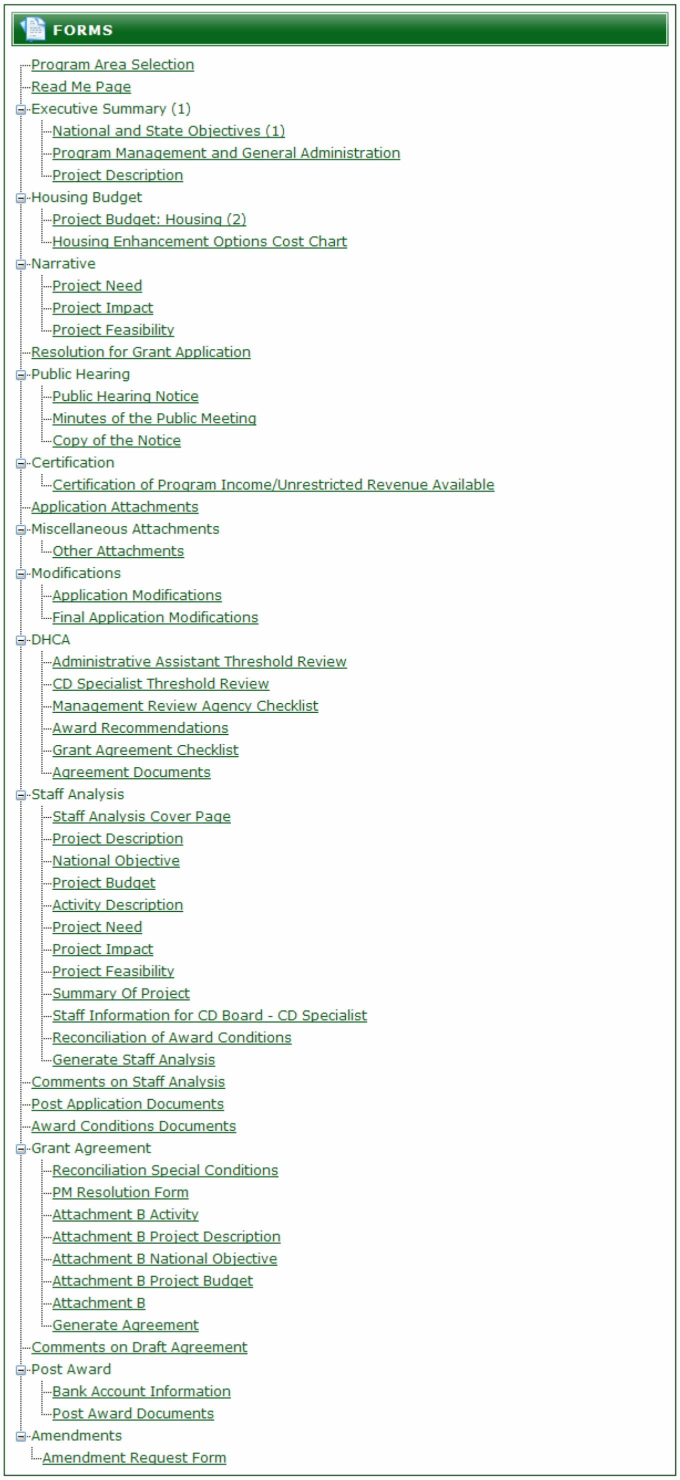
5.f. Management Activities Section

The Management Activities section allows an applicant user the ability to add/edit organizations and people from the application/pre-application and view the status history of the application/pre-application.



5.g. Forms Section

The Forms section is where the vast majority of the work in an application or pre-application is completed. This section contains all of the forms that are necessary to complete prior to the application or pre-application being submitted. To create or edit an application form simply click the name of the form.



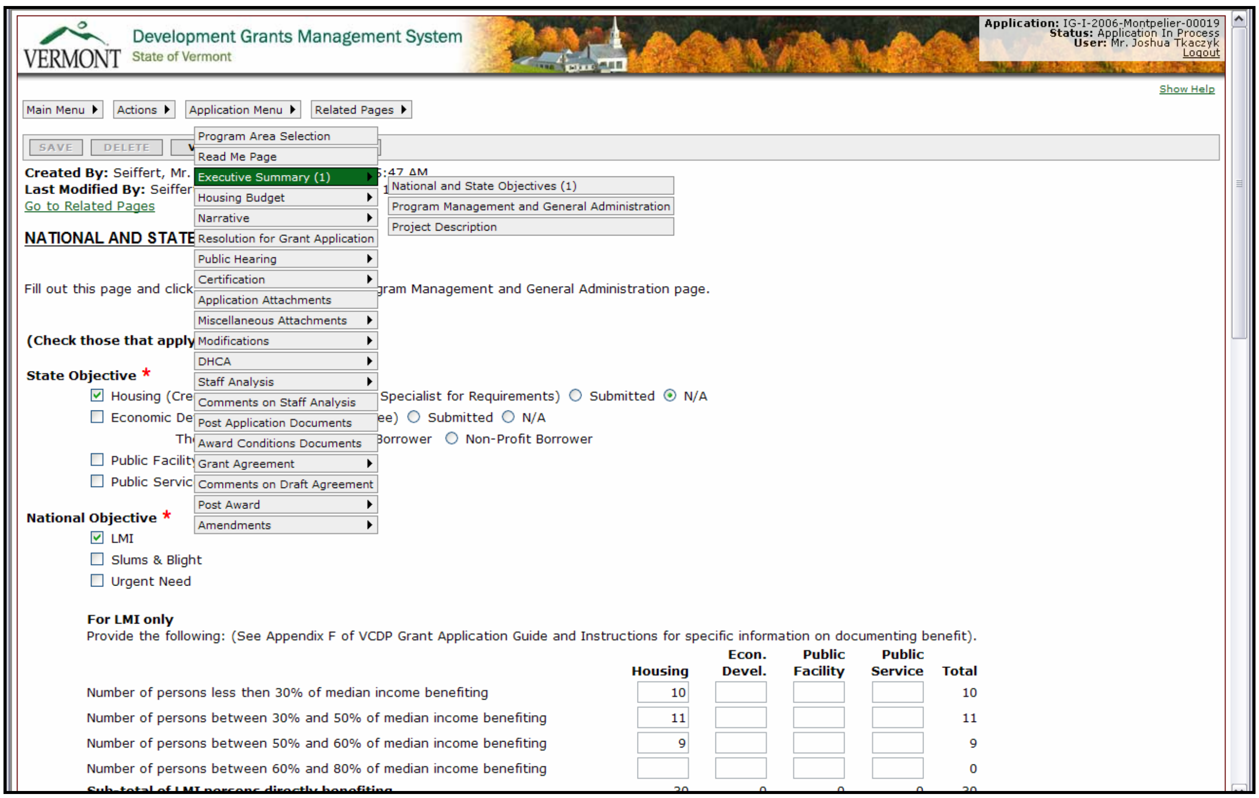
6. Application/Pre-Application Form Completion

The various forms in the Forms section of your application/pre-application must be completed before you can submit your application/pre-application. The following sections will lead you through the steps necessary for accomplishing that goal.

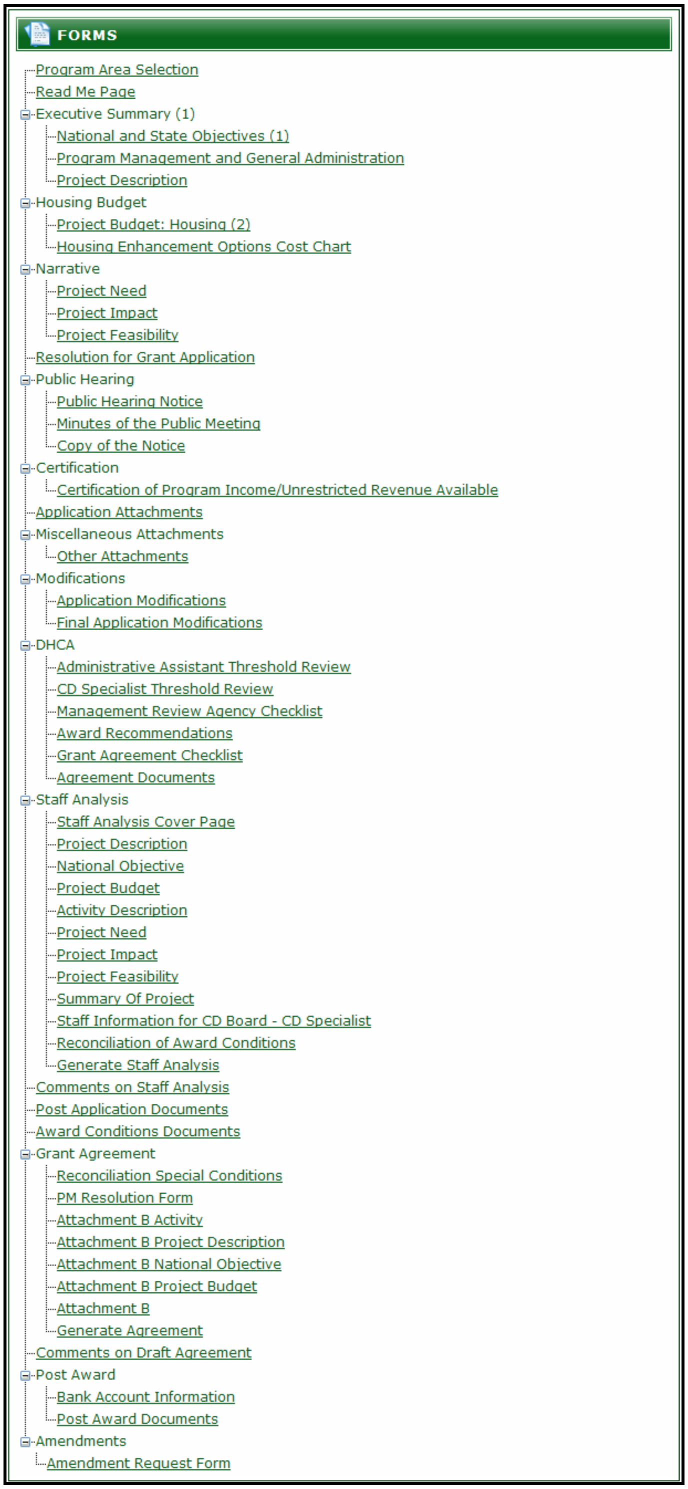
6.a. Forms Navigation

There are two basic methods for navigating through the forms of your application/pre-application. You may either use the Menu at the top of any page within the application/pre-application, or you may use the treeview on the Application Menu.

The image shown below is the Menu with the cursor hovering over the “Executive Summary” link. To return to the Main Menu from this menu simply click the “Main Menu” link to the far left. To select a particular form in the application/pre-application hover over the “Application Menu” then the section of the link you want to access, and then click the link.

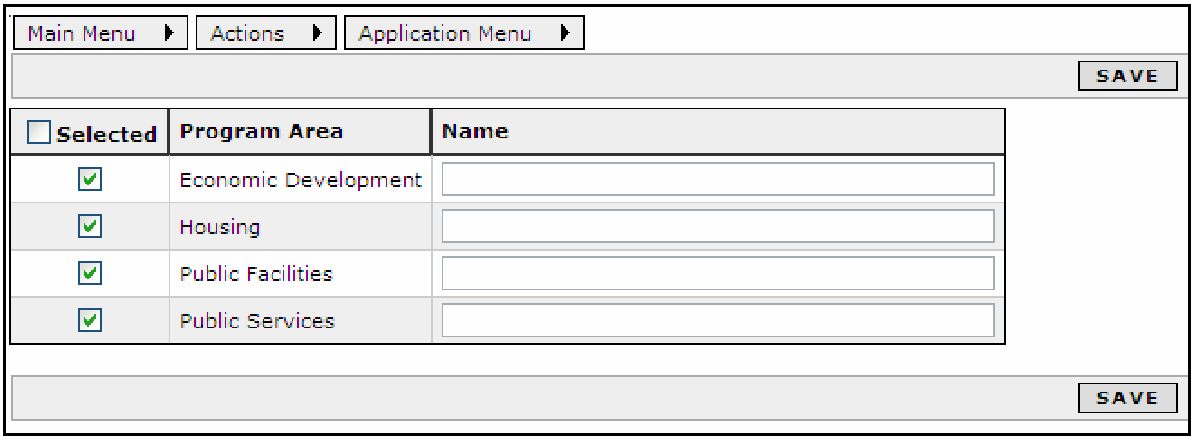


The treeview on the Application Menu is another way to navigate to each of the forms in the application/pre-application.



6.b. Program Area Selection

If your particular grant program has a “Program Area Selection” link in your Forms section, this link will be used to determine which additional forms are necessary for your project. In order to see the forms for that particular program area, you must check the “Selected” checkbox, provide a name for the program area (optional) and then click the “Save” button. The forms for that program area will then appear on your treeview.

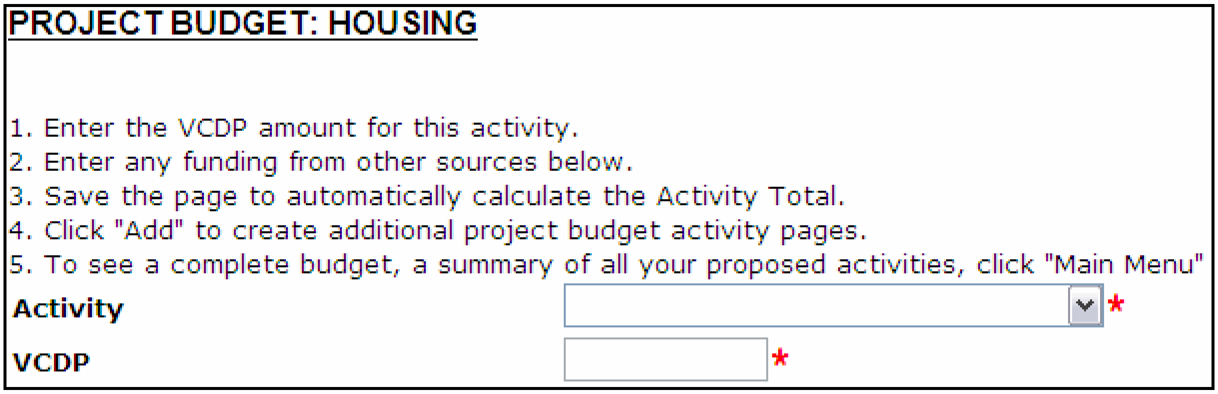


6.c. Budget Forms

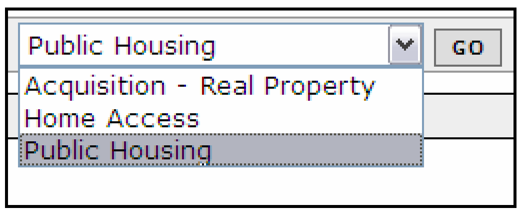
Once you have chosen the program area(s) for your application from the “Program Area Selection” link, the Budget Forms and all appropriate forms for that program area will appear on your menu tree.

6.d. Form Completion

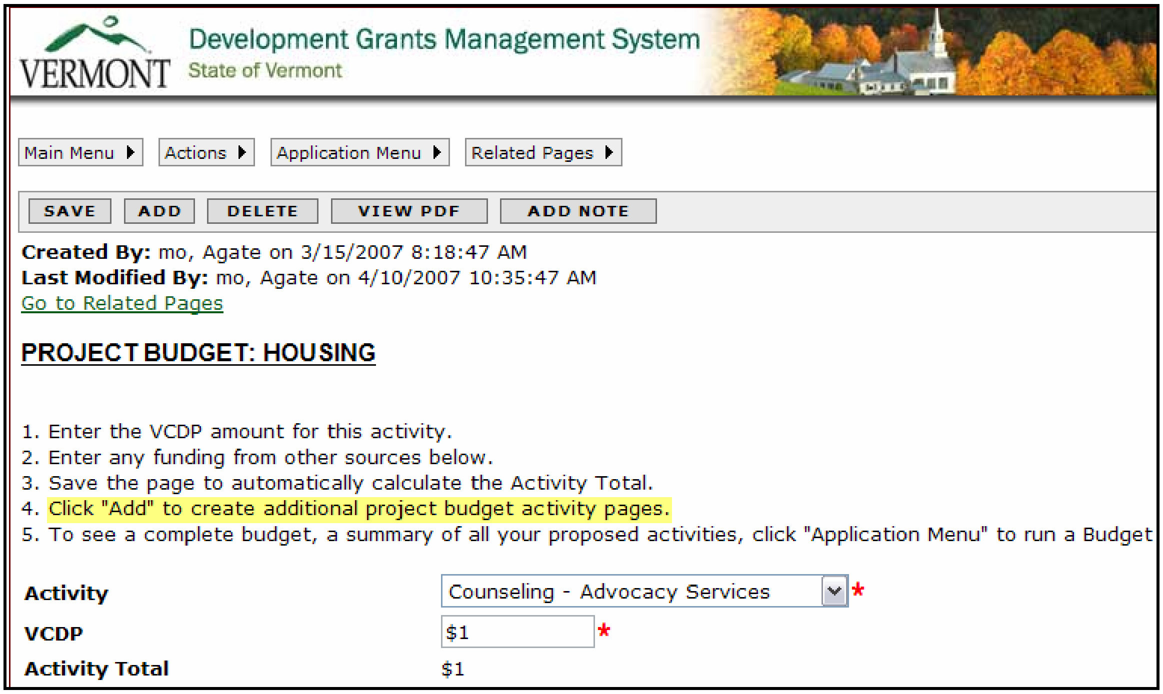
When filling out an application form it is suggested that you first complete all of those fields for which you have information. Not everyone in each organization will have all of the information necessary to complete each form. Complete as much of it as you can and then click the “Save” button. Fields followed by red asterisks are required fields. The large text area fields do not recognize all types of formatting. The website will timeout due to inactivity so be sure to save often. If the system times out there is no guarantee that the data recently entered will be saved.



When multiple budget items have been created for this particular form, you can choose between them from the dropdown that will appear on the far right of the button toolbar.



Any form that has an “Add” button allows you to have multiple instances of that form. The following picture shows that on the “Project Budget - Housing” page that multiple activities can be added on that page.


VERMONT

Development Grants Management System

State of Vermont

Main Menu ▸ Actions ▸ Application Menu ▸ Related Pages ▸

SAVE | ADD | DELETE | VIEW PDF | ADD NOTE

Created By: mo, Agate on 3/15/2007 8:18:47 AM
Last Modified By: mo, Agate on 4/10/2007 10:35:47 AM
Go to Related Pages

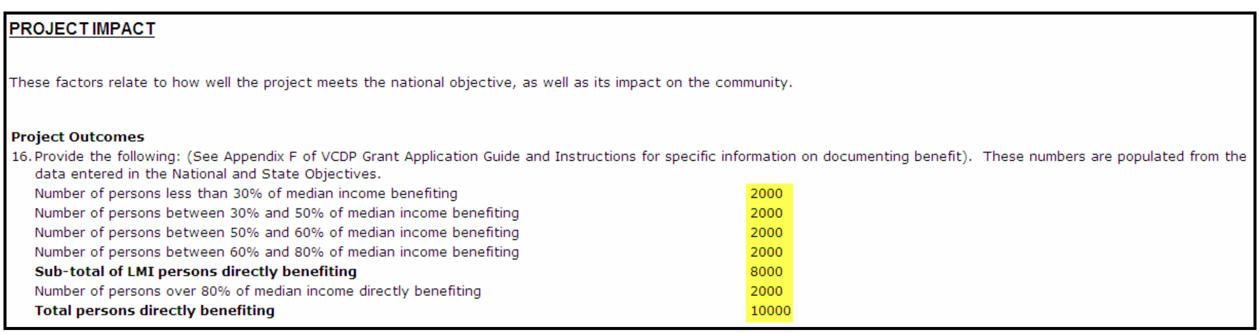
PROJECT BUDGET: HOUSING

1. Enter the VCDP amount for this activity.
2. Enter any funding from other sources below.
3. Save the page to automatically calculate the Activity Total.
4. Click "Add" to create additional project budget activity pages.
5. To see a complete budget, a summary of all your proposed activities, click "Application Menu" to run a Budget

Activity	Counseling - Advocacy Services *
VCDP	$1 *
Activity Total	$1

6.e. Automatic Calculations

When possible, the Development GMS will automatically calculate totals for you. The “Project Impact” is a good example of this. When the page is saved the system will use the values that you have entered from the National and State Objective page and populate the values to be calculated. The system will show you these values and will use them to automatically generate other totals as well. The Development GMS makes it easier for you by doing much of the math that is required in the application/pre-application.


PROJECT IMPACT

These factors relate to how well the project meets the national objective, as well as its impact on the community.

Project Outcomes

16. Provide the following: (See Appendix F of VCDP Grant Application Guide and Instructions for specific information on documenting benefit). These numbers are populated from the data entered in the National and State Objectives.

Number of persons less than 30% of median income benefiting	2000
Number of persons between 30% and 50% of median income benefiting	2000
Number of persons between 50% and 60% of median income benefiting	2000
Number of persons between 60% and 80% of median income benefiting	2000
Sub-total of LMI persons directly benefiting	8000
Number of persons over 80% of median income directly benefiting	2000
Total persons directly benefiting	10000

6.f. Pre-populated Form Fields

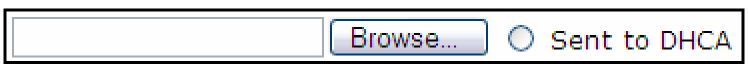
Where possible the Development GMS will pre-populate data entered in previous sections of the application. A good example of this is located in the estimated project funding summary which is based upon the budgets that you enter for each program area. The system will automatically sum these values into the budget summary.

Estimated Project Funding (This will be automatically filled in from the budget summary page.)

VCDP Request	$225,150
Municipal Funds	0
All Other Funds	$997,000
Total (Municipal & Other)	$997,000
Total Project Funding	$1,222,150

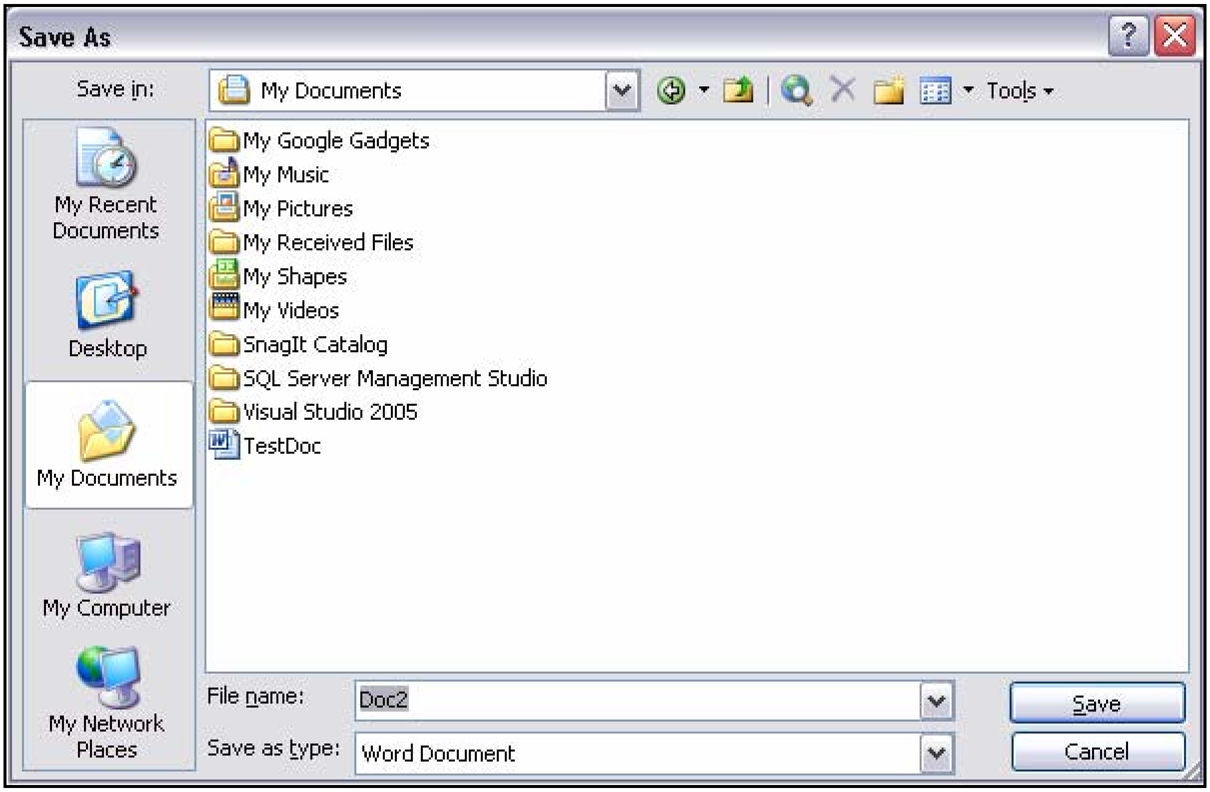
6.g. Uploads

For some pages, further documentation or information in addition to the application question may be required. In those situations, a file upload field may be provided to allow you to upload a file instead. Files of the following types are allowed as uploads, bmp, doc, gif, jpg, pdf, png, ppt, tif, txt, wpd, and xls. To upload a file, click the “Browse” button. (If would rather send the information via the postal service, click the “Sent to DHCA” button.)



Browse to the folder that contains the file you would like to upload and either double-click the file or click the file and then click the “Open” button.

The maximum permissible size for an uploaded file is 4 MB.



You must then click the form's "Save" button to save the uploaded file.

6.h. Printable Versions

Although on any page you can choose to click "File", "Print" to print the page, a better printing option exists. In many pages a "View PDF" button will be available after the form has been saved that will automatically create a PDF for you with the data that you provided in the form included within it.

These dynamic PDFs can be printed, or saved to your computer for reference.

Additionally, the entire application can be viewed in PDF format by clicking on the view PDF link in the Management Activities section on the Application Menu.

6.i. Submitting your Application/Pre-Application

The Municipal Official for your Organization is the only person authorized to submit your Application/Pre-Application. When the application/pre-application is believed to be complete and no more changes are required, the Municipal Official can choose to submit.

It is important to note that once an application/pre-application is submitted it will enter into a read-only status and cannot be changed!

To submit the Municipal Official must choose the "Application Submitted" status in the Status Management section and then click the "Change Status" button. If any errors exist in the application/pre-application they will appear at that time and they must be fixed before it can be submitted. If no errors exist, the Municipal Official will be prompted to confirm his or her decision.

7. Grant Agreement Process

To be determined.

8. Grant Management

In this section, instructions focus on the various functions inherent in managing your grant: Progress Reports, Environmental Review Reports, Requisitions, On-site Monitoring Reports and Grant Audit Reports. .

8.a. Environmental Review Report

This section will be added at a later date.

8.b. Progress Report

This section will be added at a later date.

8.c. Requisitions

This section will be added at a later date.

8.d. On-Site Monitoring

This section will be added at a later date.

8.e. Grant Audit Report

This section will be added at a later date.

9. Roles Definitions

Roles are the heart of the role-based security model employed in the Development GMS. Roles are used to define who does what in the system and what sort of actions each role should be able to perform at different moments in the grant life-cycle.

The following are roles for the applicant organization users**:**

Municipal Official

A Municipal Official is the highest level user within an applicant organization. The Municipal Official is responsible for certifying that the application, pre-application, and grant submissions by the organization are as accurate as they can be and have been approved by him or her. The Municipal Official can perform all applicant organization related functions and along with the Administrator and Administrator/Financial Officer roles can initiate and submit applications and pre-applications.

The Municipal Official may not necessarily be the person that performs the most work on the grant-related items in the system. The Municipal Official can assign an Administrator who has many of the same abilities as the Municipal Official but lacks the ability to submit grant applications and pre-applications.

Administrator

The Administrator for an applicant organization is the second-in-charge. This person will likely oversee much of the day-to-day grant operations along with the Writers and Viewers that he/she assigns. Also the Administrator has the ability to initiate and submit applications and pre-applications.

Administrator / Financial Officer

The Administrator/Financial Officer is responsible for overseeing much of the day to day grant operations, much like the Administrator, but is also responsible for filling out and submitting requisitions for the grants. Also the Administrator/Financial Officer has the ability to initiate and submit applications and pre-applications.

Writer

A Writer for an applicant organization is a person that can contribute to the creation of a grant application or pre-application but cannot perform the grant management tasks that may be necessary. This person will not be able to add others to the applicant organization and cannot disable the accounts of others in the organization.

Viewer

A Viewer has view-only permissions on grant related information. This person is used as an internal reviewer.